1329.0 - Australian Wine and Grape Industry, 2003

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Summary

Main Features

INTRODUCTION

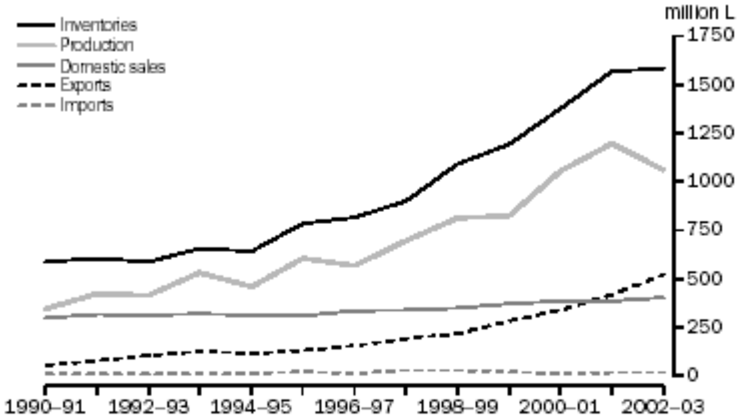
Drought conditions throughout most of the wine growing districts during 2002–03 resulted in production levels being down on 2001–02 for the Australian wine and grape industry. Grape crush was down on the last two years and wine production was below 2001–02, but was still the second highest production level recorded. Despite the reduced production, the year was highlighted by record exports of Australian-produced wine which exceeded 500 million litres. Domestic sales of Australian wine also exceeded 400 million litres.

WINE AND GRAPE INDUSTRY, Statistical summary – 2002–03

		% Change from 2001-02
Area of bearing vines (ha)	142,793	-0.4
Total grape production (t)	1,496,939	-14.7
Fresh grapes crushed (t)	1,398,528	-12.9
Beverage wine production (million L)	1,059.4	-11.4
Beverage wine inventories (million L)	1,581.8	0.7
Domestic sales of Australian wine (million L)	402.5	4.2
Domestic sales value of Australian wine ($m)	2,097.9	7.8
Exports of Australian wine (million L)	518.6	24.0
Exports of Australian wine ($m)	2,423.5	15.1
Imports of wine (million L)	17.1	18.2
Imports of wine ($m)	139.0	20.4

Source: Sales of Australian Wine and Brandy by Winemakers (cat. no. 8504.0); ABS data available on request, Wine Statistics Survey, 2002–03; Wine and Spirit Production Survey, 2002–03; Inventories of Australian Wine and Brandy 2003; Vineyards Survey, 2003.

BEVERAGE WINE TRADE



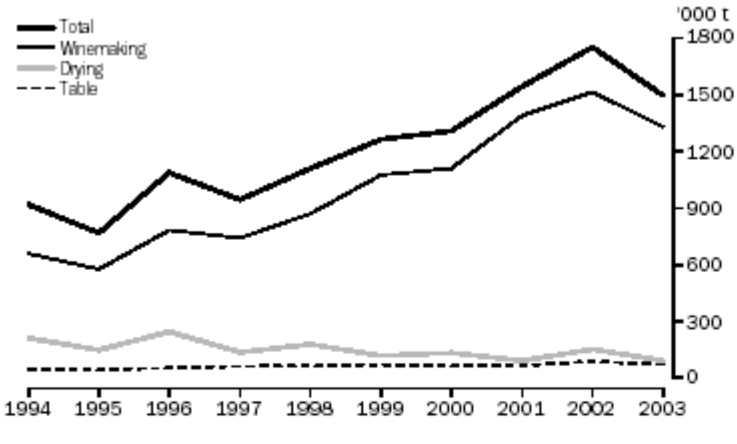
Source: Sales of Australian Wine and Brandy by Winemakers (cat. no. 8504.0); ABS data available on request, Wine Statistics Survey; Wine and Spirit Production Survey, Inventories of Australian Wine and Brandy Survey.

VITICULTURE

Estimates from the Vineyards 2003 collection show that the season 2003 recorded the first drop in grapes harvested since 1997. Hectares of vines being cultivated also dropped from a record 158,594 hectares in 2002 to 157,492 hectares in 2003. The total area of vines bearing grapes decreased slightly to 142,793 hectares while the total area of vines currently not bearing grapes decreased by 3% to 14,700 hectares.

Grapes harvested in 2003 fell by 14.7% to 1,496,939 tonnes. Red grape varieties comprised 60.6% of the total area of vines and 62.1% of the total bearing area. Red grape production was 809,493 tonnes which easily surpassed white grape production (687,446 tonnes), further reinforcing shifts in consumer preferences. There were 1,329,595 tonnes of grapes harvested for winemaking, a decrease of 12.2% over the previous year’s harvest and 4.4% down on 2001. The production of grapes for drying dropped by 39.6% to 92,264 tonnes while the harvest of table and other grapes also dropped, by 13.2%, to 75,080 tonnes.

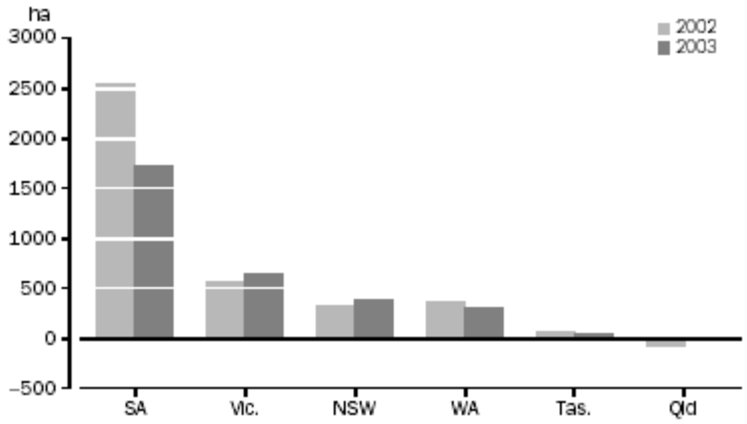
GRAPE PRODUCTION AND INTENDED USAGE



Source: ABS data available on request, Vineyards Survey.

The net increase in area planted under vines for 2002–03 (derived from vines planted and vines lost during the year) was 3,057 hectares, 21.4% lower than the 2001–02 figure of 3,890 hectares.

VINE PLANTING, Net Change by State



Source: ABS data available on request, Vineyards Survey.

Gains occurred in both the red grape and white grape varieties, with red grapes gaining 1,041 hectares and white grapes gaining 2,017 hectares. For red grape varieties, the highest gain in area was recorded for Shiraz with an additional 878 hectares, and the net gain in area of white varieties was almost totally driven by an additional 2,282 hectares of Chardonnay. This offset net losses in area of other white varieties, including a drop of 451 hectares of Sultana.

South Australia (SA) remains the principal red grape-growing state with 50.7% of total red grape production and 52.9% of the red grapes used for winemaking. Victoria (Vic.) produced 35.3% of all white grapes followed by South Australia with 30.1% and New South Wales (NSW) with 28.8%. Tasmania (Tas.) (6,390 tonnes) recorded a 103.0% increase in total grape production after a 36.7% decrease in 2002. All other states recorded a drop in 2003.

VINEYARD IRRIGATION

Data have been collected as part of the Vineyards 2003 survey collection on irrigation of vineyards in 2002–03. Information on number of vineyards and hectares irrigated, quantity of water used, watering method used and source of water were collected.

Of the 8,219 vineyards in Australia, 6,933 (84.4%) were irrigated. There were 136,944 hectares of vineyards irrigated in 2002–03 with South Australia (59,291 hectares) accounting for 43.3% of the total area irrigated followed by New South Wales (32,743 hectares) and Victoria (32,581 hectares). The average usage of water was 3.90 Megalitres per hectare. Victoria averaged 5.28 Megalitres per hectare, New South Wales 4.61 Megalitres per hectare and South Australia 3.19 Megalitres per hectare.

The most common watering method used was drip or micro spray with 97,756 hectares or 71.4% of total area irrigated. Spray excluding micro spray was the second most utilised method with 24,401 hectares (17.8%). In Victoria 30.2% of all area irrigated was by spray excluding micro spray. The third most common method of watering was furrow or flood (13,366 hectares) with New South Wales accounting for 7,846 hectares or 24% of their total area irrigated using this method.

Surface water from state/private irrigation schemes was the most common source of water with 81,551 hectares drawing from this source. This was followed by underground water supply (27,551 hectares), then other surface water (21,145 hectares). South Australia was the predominant state to source water from underground water supply with 33.8% of their total area irrigated from this source.

STRUCTURE OF THE WINE AND GRAPE PRODUCTION INDUSTRIES

For the 2003 vintage there were 373 locations around Australia which crushed 50 tonnes or more of grapes, owned by 324 winemaking businesses, compared with the 2002 vintage which had 398 locations owned by 350 winemaking businesses. The fall in location numbers in 2003 was mainly attributed to smaller wineries crushing less than 50 tonnes of grapes in a year of low production.

Almost one-third of all locations are in South Australia and these accounted for 46.3% of the Australian wine grape crush. New South Wales/Australian Capital Territory (ACT) had 23.6% of the total number of locations with 33.9% of the total wine crush, while Victoria had 20.6% of all locations with 15.1% of all grapes crushed and Western Australia (WA) had 19.8% of locations with 4.3% of the crush.

The 324 winemaking businesses are diverse in size, with 181 of these businesses crushing 50–400 tonnes, having a combined crush of 30,048 tonnes (2.1%), while 143 businesses crushing more than 400 tonnes, crushed a total of 1,368,480 tonnes (97.9%) of grapes. Compared with the 2002 vintage the number of businesses crushing 50–400 tonnes decreased by 8.6% and their quantity of grapes crushed fell by 5.5%. Those crushing more than 400 tonnes decreased by 5.9% in number and 13.1% in the quantity of grapes crushed. The 122 smallest businesses crushed less than 1% of all grapes and averaged 108 tonnes each, while the 11 largest businesses crushed 68.6% of all grapes and averaged 87,246 tonnes each.

An alternative view of the wine manufacturing industry, together with the grape-growing industry is available from the 2001 Census of Population and Housing. It identified 14,480 persons whose main job was in the manufacturing or blending of wine and 15,629 persons whose main job was in grape-growing. This excludes casual workers such as grape pickers and other seasonal workers not working in those industries in the week prior to the census. It also excludes people who worked in wine and grape production as a second job.

Employees comprise 90.6% of all persons employed in wine manufacturing, whilst that category comprise 82.2% across all industries and only 62.7% of employment within the grape-growing industry. At the time of the census, the proportion of persons working full-time in the grape-growing (71.2%) and wine manufacturing (78.0%) industries was higher than for all industries (64.6%).

LABOUR FORCE, SELECTED CHARACTERISTICS OF EMPLOYED PERSONS – 2001

	Grape-growing %	Wine manufacturing %	All industries %
Status in employment			
Employee	62.7	90.6	82.2
Employer	15.0	4.6	7.0
Own account worker	20.7	4.3	10.1
Contributing family worker	1.7	0.6	0.7
Full-time	71.2	78.0	64.6
Part-time	26.9	20.7	32.4
Not stated	1.9	1.3	3.0
Annual individual income			
Less than $15 600	21.9	11.9	17.6
$15 600-$25 999	32.7	23.2	20.6
$26 000-$51 999	33.1	47.3	41.3
$52 000 and over	9.6	15.8	18.2
Not stated	2.7	1.9	2.4

Source: Census of Population and Housing, 2001.

There was a higher proportion of low income earners, (workers with an annual income of less than $15,600) in the grape-growing industry (21.9%) than in wine manufacturing (11.9%) and for all industries (17.6%). At the upper end of the income ranges, 9.6% of workers whose main job was in the grape-growing industry earned $52,000 or more compared with 15.8% in the wine manufacturing industry. Both figures are lower than that for all industries (18.2%).

Post-secondary educational qualifications were less common among workers in both the grape-growing and wine manufacturing industries than the average across all industries. Of those employed in grape-growing, 7.3% had a degree or higher compared with 15.3% in wine manufacturing and 18.7% for all industries.

The grape-growing and wine manufacturing industries have a higher male to female ratio than for all industries. Grape-growing workers tend to be older with 42.8% aged 45 years and over compared with 32.6% of wine manufacturing workers and 34.3% for all industries.

The grape-growing and wine manufacturing industries have a higher proportion of Australian-born workers compared with all industries.

SOCIAL CHARACTERISTICS OF EMPLOYED PERSONS – 2001

	Grape-growing %	Wine manufacturing %	All industries %
Level of post-secondary qualification			
Degree or higher	7.3	15.3	18.7
Other qualification	21.9	26.9	28.0
No qualification	65.5	52.6	47.4
Inadequately described or not stated	5.4	5.1	5.9
Sex			
Males	70.3	65.8	54.8
Females	29.7	34.2	45.2
Age (years)			
15-24	14.2	14.4	16.8
25-34	19.2	27.0	23.5
35-44	23.8	25.9	25.4
45-54	23.1	21.2	22.5
55 or more	19.7	11.5	11.7
Birthplace			
Australia	81.0	83.1	74.2
Overseas main English-speaking countries	6.2	9.4	10.7
Southern Europe	3.5	1.0	1.3
Other Europe	3.9	2.3	3.8
Other	5.3	4.1	10.0

Source: Census of Population and Housing, 2001.

WINE PRODUCTION AND GRAPES CRUSHED

Winemakers who crushed in excess of 50 tonnes of grapes reported a combined total of 1,398,528 tonnes of grapes crushed in 2002–03, a drop of 12.9%, or 207,318 tonnes, on 2001–02. The drop in crush was influenced by the drought conditions that most grape growing regions experienced during the 2002–03 season. The quantity of red grapes crushed decreased by 9.3% to 825,000 tonnes while white grapes crushed decreased by 18.6% to 573,528 tonnes. Similar to 2001–02, the larger winemakers (those crushing more than 400 tonnes of fresh grapes) crushed 97.8% or 1,367,621 tonnes of the 2002–03 total.

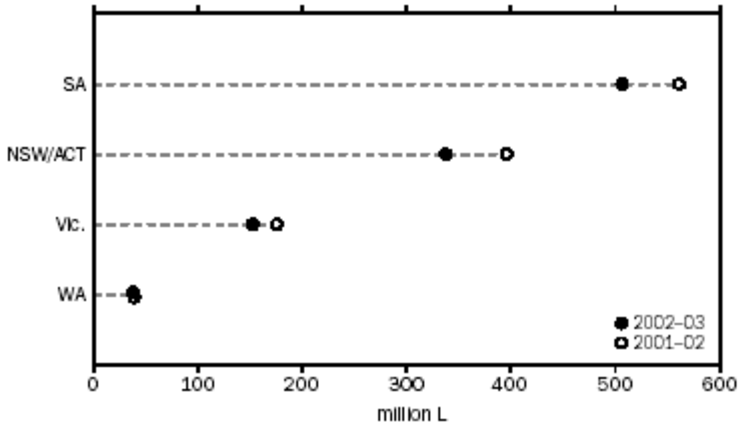
For the first time in six years production of beverage wine by larger winemakers fell, with 1,037.6 million litres produced in 2002–03, a drop of 11.6%, or 136.5 million litres, on 2001–02. Although less than the production of 2001–02, this year's production of beverage wine is still the second highest production recorded. Production of unfortified wine accounted for 98.2% of the total production of beverage wine. Fortified wine production fell by 21.8% to 18.2 million litres, decreasing its 2.0% share of total beverage wine production in 2001–02 to 1.8% in 2002–03.

BEVERAGE WINE PRODUCTION

Source: ABS data available on request, Wine and Spirit Production Survey.

Beverage wine production in 2002–03 decreased in all states except Tasmania, with the three major wine-producing states accounting for 96.1% of total production. Queensland recorded the largest decrease of beverage wine production in percentage terms, down 37.9% and New South Wales/Australian Capital Territory recorded the largest decrease by volume, down 58.8 million litres, followed by South Australia which decreased by 54.3 million litres. Western Australian production fell marginally while Tasmanian production more than trebled, to 1.8 million litres.

BEVERAGE WINE PRODUCTION, By state

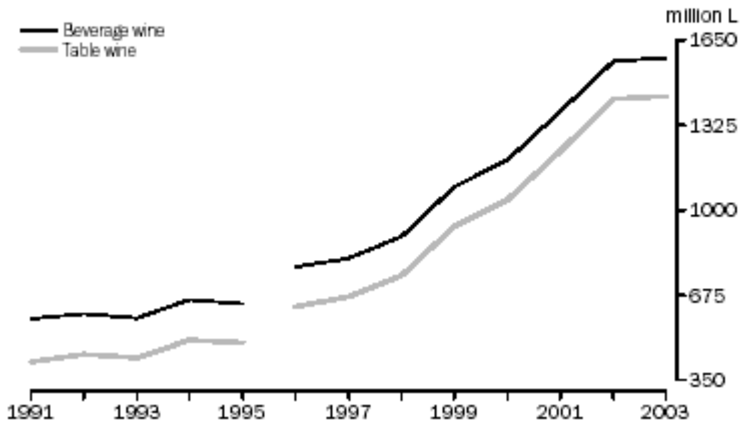


Source: ABS data available on request, Wine and Spirit Production Survey.

WINE INVENTORIES

Inventories of Australian beverage wine owned by winemakers reached another record high of 1,581.8 million litres at 30 June 2003. As with previous years, red/rosé table wine continued to dominate inventories, rising 2.3% (20.8 million litres) to 940.7 million litres and representing 59.5% of total beverage wine inventories.

INVENTORIES OF AUSTRALIAN WINE–At 30 June(a)

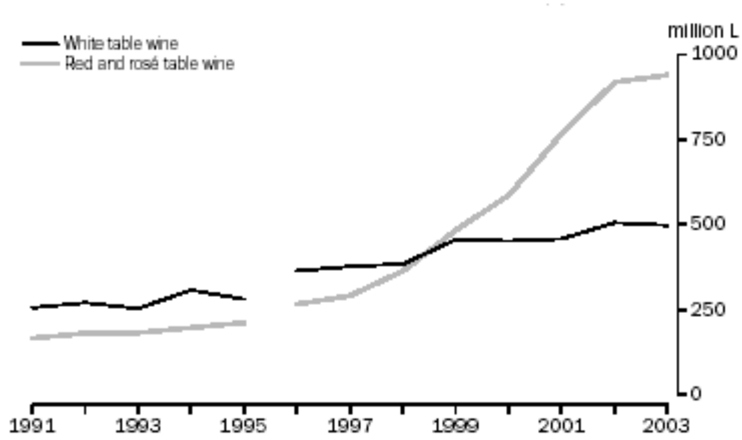


(a) Break in data indicates a break in series, new definition used in 1996. See paragraph 12 of the Explanatory Notes.
Source: ABS data available on request, Inventories of Australian Wine and Brandy Survey.

Table wine inventories had a small rise of 0.8% to 1,438.0 million litres at 30 June 2003. Of all table wine inventories, red/rosé table wine (65.4%) exceeded white table wine (34.6%) compared with 64.5% and 35.5% respectively at 30 June 2002.

This modest rise of 0.8% follows growth in inventories ranging between 9.4% and 21.0% in the previous four years and is indicative of wine producers using up reserves of wine held to meet the continued demand in a lower production year.

INVENTORIES OF AUSTRALIAN TABLE WINE–At 30 June(a)

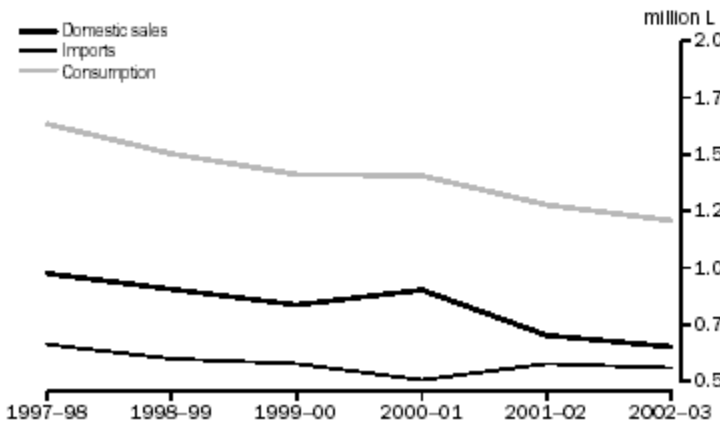


(a) Break in data indicates a break in series, new definition used in 1996. See paragraph 12 of the Explanatory Notes.
Source: ABS data available on request, Inventories of Australian Wine and Brandy Survey.

BRANDY AND GRAPE SPIRIT

A fall of 7.1% in domestic sales of Australian brandy to 651,000 litres of alcohol occurred in 2002–03. This continues the downward trend occurring since 1980–81 apart from 2000–01 when domestic sales increased by 7.6%. Exports of Australian brandy fell 12.5% to 21,000 litres of alcohol, while the volume of imported brandy cleared for home consumption also decreased, by 3.5%, to 557,000 litres of alcohol.

DOMESTIC SALES, IMPORTS AND CONSUMPTION OF BRANDY

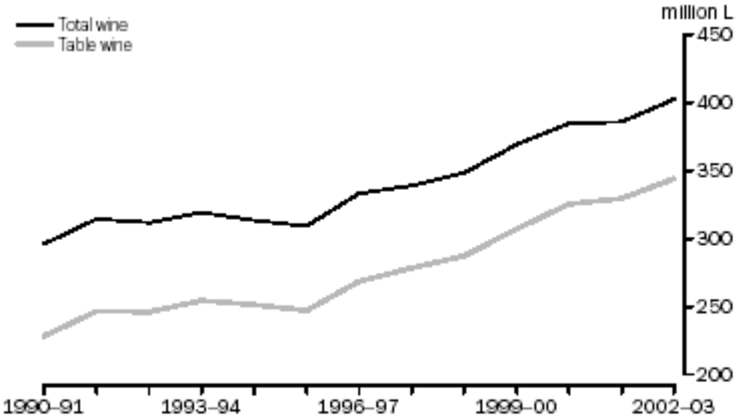


Source: Sales of Australian Wine and Brandy by Winemakers (cat. no. 8504.0).

DOMESTIC WINE SALES

Domestic sales of Australian wine in 2002–03 were 402.5 million litres, an increase of 16.3 million litres on the record level of the previous year, and the first time domestic sales had passed 400 million litres. The rise was predominantly a result of an increase in sales of red/rosé table wine (12.4 million litres) and bottle fermented sparkling (5.3 million litres) which offset the reduced sales of Bulk fermented sparkling (down 3.4 million litres).

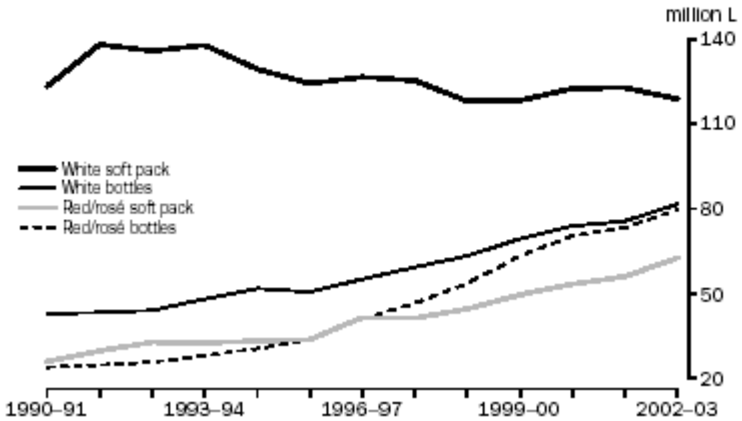
DOMESTIC SALES OF AUSTRALIAN WINE BY WINEMAKERS



Source: Sales of Australian Wine and Brandy by Winemakers (cat. no. 8504.0).

The quantity of table wine sold in glass containers of less than two litres has increased each year since 1990–91 and represents an increasing proportion of total table wine sold. In 2002–03, 161.4 million litres of table wine was sold in glass containers less than two litres, comprising 79.8 million litres of red/rosé wine and 81.7 million litres of white wine. The amount of table wine sold in soft packs increased to 181.7 million litres, 2.8 million litres more than the previous year. Other containers accounted for 1.4 million litres, down from 2.2 million litres in 2001–02.

DOMESTIC SALES OF AUSTRALIAN RED AND WHITE TABLE WINE

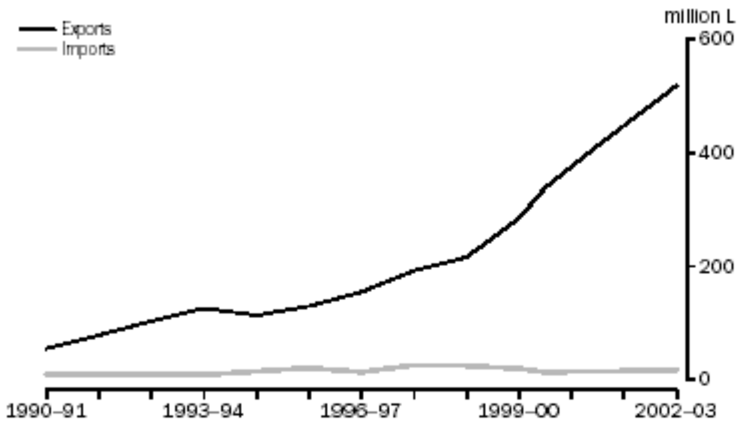


Source: Sales of Australian Wine and Brandy by Winemakers (cat. no. 8504.0).

INTERNATIONAL TRADE

The strong growth in Australian wine exports evident since the mid-1980s continued in 2002–03 as Australia exported 518.6 million litres of wine, valued at $2,423.5m. Since 1986–87 the trade balance for wine in both quantity and value terms has consistently been in surplus (exports greater than imports), which in turn has generally been increasing over time. The record levels of wine exported in 2002–03 represented an increase of 24.0% in volume and 15.1% in value over the previous records set a year earlier.

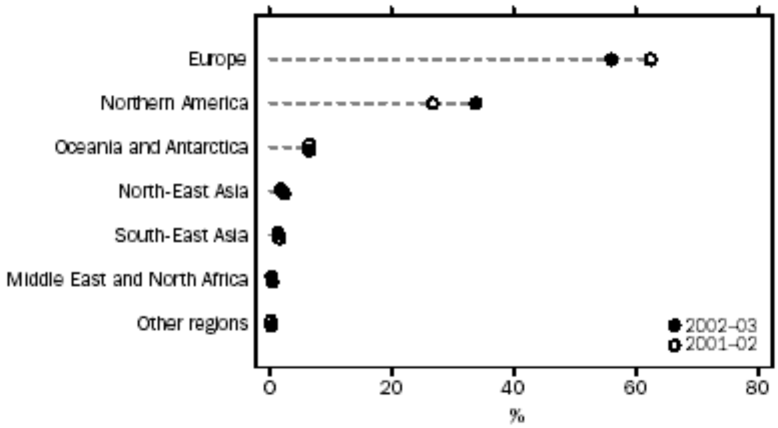
IMPORTS OF WINE AND EXPORTS OF AUSTRALIAN WINE



Source: Sales of Australian Wine and Brandy by Winemakers (cat. no. 8504.0).

The European Union continued to be the major regional destination for Australian wine exports in 2002–03. It accounted for 281.6 million litres (54.3% of total exports by volume), valued at $1,140.4m (47.0% of total exports by value). Exports to Northern America increased by 63.7 million litres (or 57.0%) to 175.4 million litres and were valued at $1,009.0m (41.6% of total exports by value). The United Kingdom was the major country of destination for Australian wine, taking 209.5 million litres, (up 3.8% from 2001–02) followed by the United States of America which received 150.9 million litres (an increase of 62.2% on the previous year).

DESTINATION OF AUSTRALIAN WINE EXPORTS–2002–03(a)

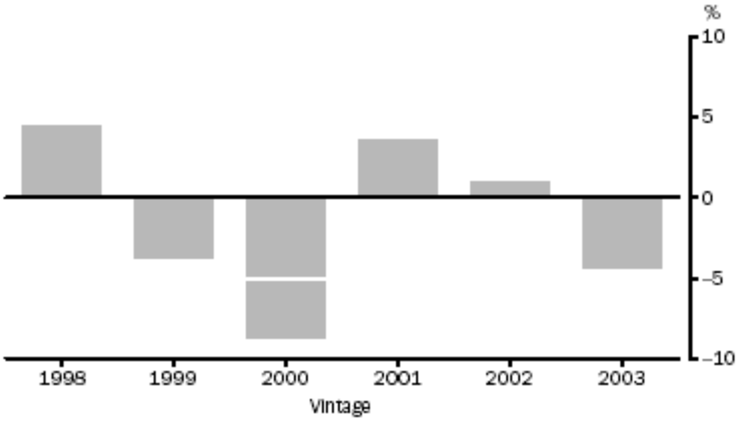


(a) Proportion of total wine exports.
Source: ABS data available on request, International Trade database.

GRAPE AND WINE PRICES

The grape price index is calculated by using the base weighted movement in prices for each of the varieties included in the survey. The index does not allow for price movements caused by a change in the mix of varieties. Movements in the prices paid for wine grapes are presented in the graph below and in table 28.

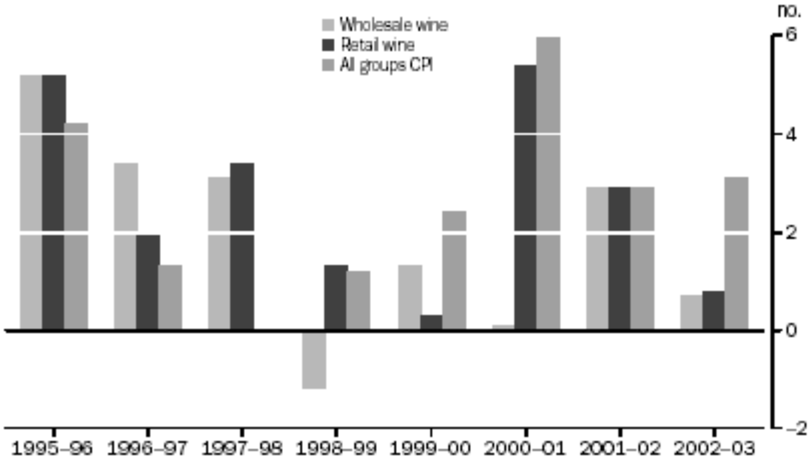
PRICE INDEX OF GRAPES USED IN WINE PRODUCTION, Change on previous vintage



Source: ABS data available on request, Price Indexes of Articles Produced by Manufacturing Industries.

The wholesale price index of total wine recorded a 0.7% increase in 2002–03, while the price received by winemakers for table wine and fortified wine also recorded an increase of 0.7%. The wine group retail price index for 2002–03 increased 0.8%, with the general, all groups consumer price index increasing 3.1%.

SELECTED PRICE INDEXES, Change on previous financial year

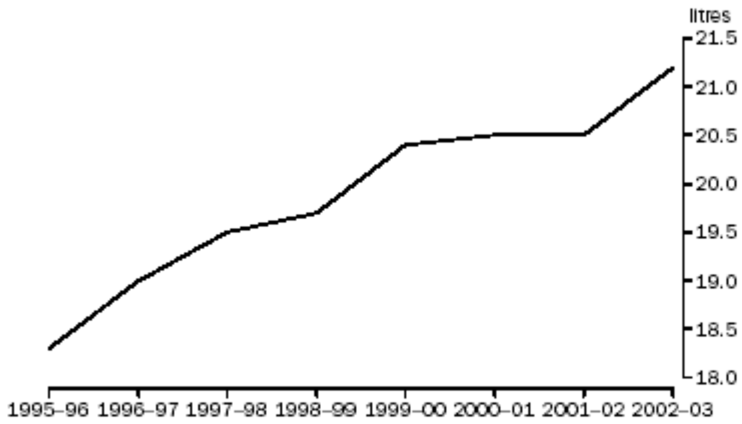


Source: ABS data available on request, Price Indexes of Materials Used in Manufacturing Industries, Consumer Price Index.

WINE CONSUMPTION

Apparent per capita consumption of wine has increased to 21.2 litres in 2002–03 after being relatively unchanged in recent years, with levels of 20.4 litres in 1999–2000, rising to 20.5 litres in 2000–01 and remaining at 20.5 litres in 2001–02. This latest increase is more in line with the movements of the past decade and to the longer term trend which has seen per capita consumption of wine climb from levels of less than three litres in the late 1930s.

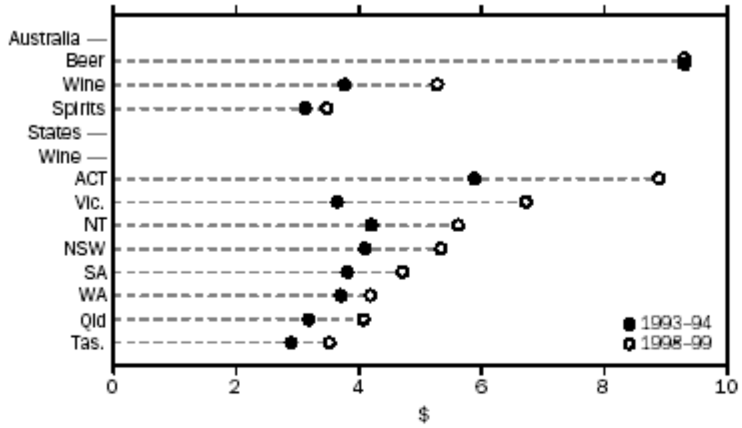
PER CAPITA CONSUMPTION OF WINE



Source: Sales of Australian Wine and Brandy by Winemakers (cat. no. 8504.0).

The most current details of household expenditure show that during 1998–99 Australian households spent an average of $5.28 per week on wine. Households in the Australian Capital Territory spent the most with $8.88 and those in Tasmania the least with $3.52. Victorian households spent the highest proportion of their total weekly alcohol expenditure on wine (33%), while Northern Territory (NT) households spent the lowest (15%). From 1993–94 to 1998–99 there was a 40% increase in weekly expenditure on wine nationally.

AVERAGE WEEKLY HOUSEHOLD EXPENDITURE, Alcoholic Beverages

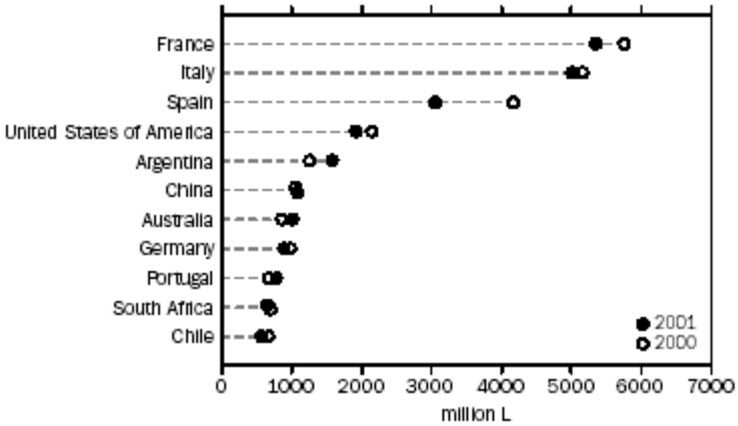


Source: Household Expenditure Survey, Australia: Detailed Expenditure Items, 1998-99 (cat. no. 6535.0).

WORLD COMPARISONS

Of the countries for which 2001 data are available, Australia's ranking for area of vines planted (0.148 million hectares) was twelfth, the same position as the previous year. Spain (1.235 million hectares), France (0.914 million hectares) and Italy (0.908 million hectares) had the greatest areas under vine. Australia was ranked tenth in terms of total grape production (1.546 million tonnes) with Italy (8.988 million tonnes) and France (7.313 million tonnes) occupying the top two rankings in this category. France (5,338.9 million litres) and Italy (5,009.3 million litres) were the largest producers of wine with Australia occupying seventh placing, producing 1,016.3 million litres.

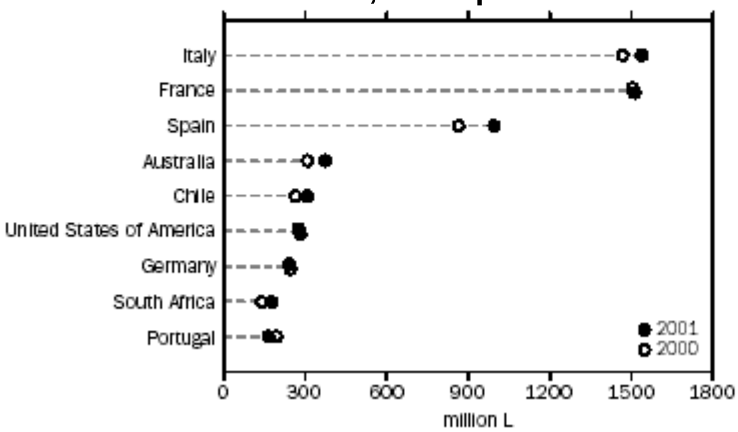
PRODUCTION OF WINE, Principal Countries



Source: Dutruc-Rosset 2003.

The countries exporting the largest volumes of wine in 2001 were Italy, France, Spain, Australia, Chile, the United States of America and Germany, accounting for 80.5% of total world wine exports. Australia was ranked the fourth largest exporter of wine and had the second highest proportion of its production exported, compared with other leading exporting nations. The highest proportion was achieved by Chile with 54.6% of production followed by Australia with 36.9%. Australia's per capita consumption of wine in 2001 increased slightly to 20.6 litres (20.4 litres in 2000), well below the leading countries of France (57.1 litres), Italy (53.0 litres) and Portugal (46.8 litres).

EXPORTS OF WINE, Principal Countries



Source: Dutruc-Rosset 2003.

BIBLIOGRAPHY

Much of the ABS data used in this publication were sourced from various ABS collections. In some cases more detailed data, which were previously available on request, were used. In the list of ABS publications below, a catalogue number is quoted whenever possible to enable users to access explanatory information about various datasets. Further inquiries about these and other more detailed data, can be made either to Graeme Thomas (Adelaide (08) 8237 7536) or to the contact officer named in the specific publications.

ABS PUBLICATIONS

Apparent Consumption of Foodstuffs, Australia, cat. no. 4306.0.
Consumer Price Index, Australia, cat. no. 6401.0.
Household Expenditure Survey, Australia: Detailed Expenditure Items, 1998–99, cat. no. 6535.0.

International Merchandise Trade, Australia, cat. no. 5422.0.
International Trade Price Indexes, Australia, cat. no. 6457.0.
Producer Price Indexes, Australia, cat. no. 6427.0.
Sales of Australian Wine and Brandy by Winemakers, cat. no. 8504.0.

ABS SURVEYS AND DATABASES

Export Price Index.
Import Price Index.
International Trade database.
Inventories of Australian Wine and Brandy, 30 June 2003.
Vineyards, 2003.
Wine and Spirit Production, 2002–03.
Wine Statistics, 2002–03.

NON-ABS SOURCES

Dutruc-Rosset, G, 2003, The State of Vitiviniculture in the World and the Statistical Information in 2001, Office International de la Vigne et du Vin, Paris.

About this Release

ABOUT THIS RELEASE

Continues: 7310.0 and 8366.0

A statistical compendium of Australia's wine and grape industry containing information on: area of vines and production of grapes by region; wine production and grapes crushed by region; structure of the wine manufacturing industry; inventories of wine owned by winemakers at 30 June; brandy and grape spirit production; domestic wine sales; exports and imports of wine; price indexes of grapes and wine; consumption of wine; and world comparisons.

Explanatory Notes

Explanatory Notes

INTRODUCTION

1 This publication presents final estimates from the ABS collections: Inventories of Australian Wine and Brandy, 2002–03; Wine and Spirit Production, 2002–03; Wine Statistics, 2002–03 and Vineyards, 2003. Not all data from these collections are published here. Some further data are available for a charge, on application to the ABS.

2 This publication is a summary of statistics on grape and wine production and related activities collected by the ABS and from other sources. Some of the data used in this publication were obtained from various ABS collections for which publications with appropriate Explanatory Notes are already available. The bibliography contains a list of these publications. However, much of the data are only available in this publication and the following notes are provided to assist users.

3 The Viticulture tables replace the previous publication Viticulture, Australia (cat. no. 7310.0) and contain information on area of vines and production of red and white grapes for the 2003 season. The continuing collection of varietal data is supported by Australia's grape-growers and winemakers and the Australian government through the Grape and Wine Research and Development Corporation.

4 Differences exist between the grape production intended for winemaking reported by grape growers in the viticulture collection and the quantity of fresh grapes crushed by winemakers reported in the Wine and Spirit Production Collection. Differences in the collection methodologies, as outlined below, mean some difference should always be apparent between the series.

SCOPE AND COVERAGE OF VITICULTURE SURVEY

5 Viticultural statistics relate to the year in which the harvest occurred and are derived from information obtained in a collection of all known growers.

6 Prior to the 1999 collection, an exercise was undertaken to increase the number of known growers included in the collection. The improved coverage, of over 1,000 growers, means that the data presented for 1999 and later years are not directly comparable with data for previous years.

7 The scope of the 2003 collection is based on establishments undertaking agricultural activity and having an estimated value of agricultural operations of $5,000 or more. The scope of the collection from season 1994 to season 2002 was also $5,000. Prior to the 1994 season the scope varied. Details are available on request.

8 Tasmanian data are derived from a collection undertaken by the Appellation of Origin Board under the authority of The Commissioner of Licensing. The scope of the collected data is the same as for other states.

9 Viticultural statistics are presented on an Australian Geographical Indications (GI) basis in this issue. The GI are official descriptions of Australian wine zones, regions and sub-regions which are defined in the Australian Wine and Brandy Act. The zones and regions listed in the following table were provided to the ABS by the Australian Wine and Brandy Corporation. The list includes those regions which had been determined at the time of the Vineyards 2003 Survey and was used by the survey respondents for reference in allocating a response to a GI question on the survey form.

SCOPE AND COVERAGE OF WINE SURVEYS

10 Winemakers who crush more than 400 tonnes of grapes are included in the Wine and Spirit Production Survey. Wine production data are collected from these winemakers on a winery (location) basis to allow for state and regional data output. The grapes crushed by these wineries includes grapes owned by others and crushed on a commission or contract basis, often for wine producers who do not have their own crushing facilities. These wineries account for approximately 98% of total crushings by all winemakers crushing 50 or more tonnes of fresh grapes. Limited information on the quantity of grapes crushed and domestic

wine sales are also obtained from winemakers crushing between 50 and 400 tonnes. These data are collected on a winery (location) basis in the Wine Statistics Survey.
The main purpose for this supplementary collection is to establish the scope and coverage of both the main production collection and the monthly wine sales collection.

11 Details on inventories of Australian beverage wine by wine type are collected at 30 June only from winemakers who crush more than 400 tonnes annually and have domestic wine sales of 250,000 litres or more in the previous year. Therefore, inventories owned by winemakers with lower crush or lower domestic sales and who predominantly have wine export sales or who mainly undertake contract crushing are not included.

12 All inventories data are collected on an Australia-wide basis only and state figures are therefore not available. Inventories data collected from 1996 include all Australian-produced wines owned by these winemakers and held anywhere in Australia. In years previous to 1996, inventories included only those Australian-produced wines held by winemakers on any of their own premises, regardless of ownership. This change in the measurement of inventories means that data for 1996 and later are not directly comparable with earlier years.

13 The number of winemakers who fall within the scope of the wine inventories collection may vary from year to year as sales vary and individual wineries are included in, or excluded from, the wine sales collection. It is possible that inventories data may vary slightly each year as new wineries, with either large or small inventories, come into the scope of the collection. In particular, the published (i.e. closing) inventories figures for any one year may not equate with the opening inventories for the following year.

14 The wine content of products consisting of a mixture of wine and fruit juice, commonly known as ‘coolers’, is included in the appropriate wine category of the wine from which it is made, which is generally table wine.

ACKNOWLEDGMENT

15 ABS publications draw extensively on information provided freely by individuals, businesses, governments and other organisations. Their continued cooperation is very much appreciated: without it, the wide range of statistics published by the ABS would not be available. Information received by the ABS is treated in strict confidence as required by the Census and Statistics Act 1905.

ABS PUBLICATIONS

16 Current publications and other products released by the ABS are listed in the Catalogue of Publications and Products (cat. no. 1101.0). The Catalogue is available from any ABS office or the ABS web site <https://www.abs.gov.au>. The ABS also issues a daily Release Advice on the web site which details products to be released in the week ahead.

Glossary

Beverage wine

Table, sparkling and fortified wine produced for direct consumption and not for distillation.

De-alcoholised wine

Normally fermented wine in which the alcohol has been removed and which retains all other components.

Distillation wine

Wine used for the purpose of distillation into grape spirit.

Feints and low wine

Parts of the distillate which are not usable.

Fortified wine

Wine to which grape spirit has been added, thereby adding alcoholic strength and precluding further fermentation. Fortified wine must contain at least 150 millilitres/litre and not more than 200 millilitres/litre of ethanol at 20 degrees Centigrade.

Grafted/grafting

The connection of two pieces of living plant tissue, so that they unite and grow as one plant.

Grape spirit

Alcohol spirit of vinous origin used in fortification or as a base for grape flavoured spirits.

Intended planting

The area of vines, reported on the ABS Vineyards collection form, grape growers intend to plant or graft after the current harvest, but before the next harvest.

Low alcohol wine

Wine in which the alcohol content has been deliberately reduced or wine which has been produced with a lower alcohol level using either dilution or partial fermentation.

Marc

The residue of grape skins and seeds after the juice has been extracted.

Must

Grape juice or crushed grapes in the process of becoming wine. Concentrated must is used as a sweetening agent.

Table and other grapes

This category refers to grape production that is not used for either winemaking or drying.

Unfermented grape juice

A sweet, clear, non-alcoholic liquid. Winemakers use the term to refer to must which has undergone clarification and stabilisation.

Unfortified wine

Table or sparkling wine which must contain at least 80 millilitres/litre of ethanol at 20 degrees Centigrade. Unfortified wines rely solely on fermentation for their alcoholic strength.